



Europäisches  
Patentamt

European  
Patent Office

Offic européen  
des brevets

JC973 U.S. PTO  
09/838420



Bescheinigung

Certificate

Attestation

Die angehefteten Unterlagen stimmen mit der ursprünglich eingereichten Fassung der auf dem nächsten Blatt bezeichneten europäischen Patentanmeldung überein.

The attached documents are exact copies of the European patent application described on the following page, as originally filed.

Les documents fixés à cette attestation sont conformes à la version initialement déposée de la demande de brevet européen spécifiée à la page suivante.

Patentanmeldung Nr. Patent application No. Demande de brevet n°

00480060.3

Der Präsident des Europäischen Patentamts;  
Im Auftrag

For the President of the European Patent Office

Le Président de l'Office européen des brevets  
p.o.

I.L.C. HATTEN-HECKMAN



Eur päisches  
Patentamt

European  
Patent Office

Office européen  
des brevets

**Blatt 2 der Bescheinigung  
Sheet 2 of the certificate  
Page 2 de l'attestation**

Anmeldung Nr.:  
Application no.: **00480060.3**  
Demande n°:

Anmeldetag:  
Date of filing: **13/07/00**  
Date de dépôt:

Anmelder:  
Applicant(s):  
Demandeur(s):  
**INTERNATIONAL BUSINESS MACHINES CORPORATION**  
Armonk, NY 10504  
UNITED STATES OF AMERICA

Bezeichnung der Erfindung:  
Title of the invention:  
Titre de l'invention:  
**Method and system in an electronic spreadsheet for managing and handling user-defined options**

In Anspruch genommene Priorität(en) / Priority(ies) claimed / Priorité(s) revendiquée(s)

Staat: Tag: Aktenzeichen:  
State: Date: File no.  
Pays: Date: Numéro de dépôt:

Internationale Patentklassifikation:  
International Patent classification:  
Classification Internationale des brevets:

Am Anmeldetag benannte Vertragstaaten:  
Contracting states designated at date of filing: AT/BE/CH/CY/DE/DK/ES/FI/FR/GB/GR/IE/IT/LI/LU/MC/NL/PT/SE  
Etats contractants désignés lors du dépôt:

Bemerkungen:  
Remarks:  
Remarques:

## METHOD AND SYSTEM IN AN ELECTRONIC SPREADSHEET FOR MANAGING AND HANDLING USER-DEFINED OPTIONS

### *Technical field of the invention*

The present invention relates to the field of information processing by digital computers, and more particularly to a method and system, in an electronic spreadsheet, for managing and handling user-defined options.

### *Background art*

Before computers, numerical analyses, particularly financial ones, were usually prepared on an accountant's columnar pad or spreadsheet, with pencil and calculator in hand. By organising data into columns and rows, spreadsheets afford the rapid assimilation of information by a reader. The task of preparing a spreadsheet on paper, however, is not quite so fast. Instead, the process tends to be very slow, as each entry must be tediously calculated and entered into the spreadsheet. Since all calculations are the responsibility of the preparer, manually prepared spreadsheets are also prone to errors. Hence, preparation of spreadsheets by hand is slow, tedious, and unreliable.

With the advent of microcomputers, a solution was forthcoming in the form of "electronic spreadsheets." Better known simply as "spreadsheets," these software programs provide a computerised replacement for the traditional financial modelling tools: the accountant's columnar pad, pencil, and calculator. In some regards, spreadsheet programs are to those tools what word processors are to typewriters. Spreadsheets offer dramatic improvements in ease of creating, editing, and using financial models.

A typical spreadsheet program configures the memory of a computer to resemble the column/row or grid format of an

accountant's columnar pad, thus providing a visible calculator for a user. Because this "pad" exists dynamically in the computer's memory, however, it differs from paper pads in several important ways. Locations in the electronic 5 spreadsheet, for example, must be communicated to the computer in a format which it can understand. A common scheme for accomplishing this is to assign a number to each row in a spreadsheet, a letter to each column, and another letter to each sheet (or page) of the spreadsheet. To reference a 10 location at column A and row 1 of the second page (i.e., the upper-left hand corner), for example, the user types in "B:A1". In this manner, the spreadsheet defines an addressable storage location or "cell" at each intersection of a row with a column within a given page.

15 Data entry into an electronic spreadsheet occurs in much the same manner that information would be entered on an accountant's pad. After a screen cursor is positioned at a desired location, the user can enter alphanumeric information. Besides holding text and numeric information, however, 20 spreadsheet cells can store special instructions or "formulas" specifying calculations to be performed on the numbers stored in spreadsheet cells. Such spreadsheet cells can also be defined and named as a range as long as they are arranged as a convex set of cells. A typical example of such a named range 25 simply corresponds to a regular table found in an accountant's pad. In this fashion, range names can serve as variables in an equation, thereby allowing precise mathematical relationships to be defined between cells. The structure and operation of a spreadsheet program, including advanced functions such as 30 functions and macros, are documented in the technical, trade, and patent literature. For an overview, see e.g., Cobb, S., *Using Quattro Pro 2*, Borland-OsbomeMcGraw-Mll, 1990; and LeBlond, G. and Cobb, D., *Using 1-2-3*, Que corp., 1985. The disclosures of each of the foregoing are hereby incorporated 35 by reference.

Electronic spreadsheets offer many advantages over their paper counterparts. For one, electronic spreadsheets are much larger (i.e., hold more information) than their paper counterparts; electronic spreadsheets having thousands or even millions of 5 cells are not uncommon. Spreadsheet programs also allow users to perform "what-if" scenarios. After a set of computational relationships has been entered into the worksheet, thanks to imbedded formulas for instance, the information can be recalculated using different sets of assumptions. The results 10 of each recalculation appears almost instantaneously. Performing this operation manually, with paper and pencil, would require the recalculation of every relationship in the model for each change made. Electronic spreadsheet systems have been invented to solve these "what-if" problems : 15 changing an input and seeing what happens to an output.

"What-if" problems can be formally represented by the definition of one or several user-defined options, each of them representing an assumption which can either be set as "True" or "False". The effect of a single given user defined 20 option can take different forms and requires that the spreadsheet user formally represents this effect thanks to different spreadsheet built-in means. With the spreadsheet technologies currently used , such spreadsheet means can be based on the writing of some spreadsheet formulas (requiring 25 thus some in-depth knowledge of the formula language and syntax), or can also be based on the utilisation of so-called "versions". In both cases, there are several limitations which can turn these spreadsheet means into inefficient and error-prone solutions.

30 When relying on spreadsheet formulas, the user needs first to master the spreadsheet formula language, something which is by far not an easy task for somebody not used to programming languages. Then the user must define by himself some formal

representation of the user-defined options, with the associated means for managing them: this second task is even more difficult as the user cannot rely on any stringent set of rules (as the ones implemented in a language compiler or interpreter) to determine if his work is error-free. Furthermore an electronic spreadsheet prepared by a given user with his or her own way of representing options will be difficult to be used by another user if the latter has not received precise instructions from the former on the way to handle the options. In short, unless mastering advanced programming skills, it is virtually impossible for a regular spreadsheet user to realise and share error-free "what-if" scenario thanks to user-defined options, by solely relying on the spreadsheet built-in formula language.

Current spreadsheet tools implement today the concept of versions and version groups, which represent some advantages with respect to the previous approach. Nevertheless using versions presents also some limitations, as outlined hereafter. With conventional electronic spreadsheets, versions are associated to ranges of cells. Once a range of cell is "versionned", the user can defined several versions for this range. In the classical case where multiple options must be managed, the number of versions to be defined may become excessive. Indeed if an electronic spreadsheet must address a set of N independent options, any cell whose content depends on these N options should be represented with  $2^N$  versions, each of them corresponding to a given combination of these N options. Besides the resulting increase in file and memory storage (leading to degraded performances), this situation may become almost unmanageable for the user, specially in the case where multiple dispersed cells are versionned, even with the concept of version groups allowing to associate versions on different ranges of cells.

***Summary of the invention***

The present invention relates to the field of information processing by digital computers, and more particularly to a method and system of processing user defined boolean variables in a multi dimensional spreadsheet comprising a plurality of cells identified by a cell address along each dimension, said method comprising the steps of:

- defining one or a plurality of boolean variables in a table;
- referencing the one or plurality of boolean variables in one or a plurality of cells;
- activating one or plurality of boolean variables in the table;
- determining the content of the cell or plurality of cells depending on whether the one or plurality of boolean variables are activated or not in the table.

***Brief description of the drawings***

The novel and inventive features believed characteristics of the invention are set forth in the appended claims. The invention itself, however, as well as a preferred mode of use, further objects and advantages thereof, will best be understood by reference to the following detailed description of an illustrative detailed embodiment when read in conjunction with the accompanying drawings, wherein :

- Figure 1A is a block diagram of a computer system in which the present invention may be embodied.
- Figure 1B is a block diagram of a software system including an operating system, an application software, and a user interface for carrying out the present invention.

- Figure 1C illustrates the basic architecture and functionality of a graphical user interface in which the present invention may be embodied.
- Figure 2A shows a spreadsheet notebook interface according to the preferred embodiment of the present invention.  
5
- Figure 2B shows the toolbar component of the notebook interface shown in Figure 2A.
- Figures 2C and 2D show page identifiers for rapidly accessing and manipulating individual pages of the notebook interface shown in Figure 2A.  
10
- Figure 3 illustrates a preferred spreadsheet user interface for managing user defined options, according to the present invention.  
15
- Figure 4 illustrates the structure of the Option Table in the preferred embodiment of the present invention
- Figure 5 is a flow chart illustrating a preferred method for managing user-defined options according to the present invention.  
20
- Figure 6 is a simplified flow chart illustrating the system and method according to the present invention.  
25

#### ***Detailed description of the preferred embodiment***

#### **SYSTEM HARDWARE**

As shown in FIG. 1A, the present invention may be embodied on a computer system 100 comprising a central processor 101, a main memory 102, an input/output controller 103, a keyboard  
25

104, a pointing device 105 (e.g., mouse, track ball, pen device, or the like), a display device 106, and a mass storage 107 (e.g., hard disk). Additional input/output devices, such as a printing device 108, may be included in the system 100 as desired. As illustrated, the various components of the system 100 communicate through a system bus 110 or similar architecture. In a preferred embodiment, the computer system 100 includes an IBM-compatible personal computer, which is available from several vendors (including International Business Machine - IBM Corporation of Armonk, N.Y.).

Illustrated in FIG. 1B, a computer software system 150 is provided for directing the operation of the computer system 100. Software system 150, which is stored in system memory 102 and on disk memory 107, includes a kernel or operating system 151 and a shell or interface 153. One or more application programs, such as application software 152, may be "loaded" (i.e., transferred from storage 107 into memory 102) for execution by the system 100. The system 100 receives user commands and data through user interface 153; these inputs may then be acted upon by the system 100 in accordance with instructions from operating module 151 and/or application module 152. The interface 153, which is preferably a graphical user interface (GUI), also serves to display results, whereupon the user may supply additional inputs or terminate the session. In a preferred embodiment, operating system 151 and interface 153 are Microsoft Win95, available from Microsoft Corporation of Redmond, Wash. Application module 152, on the other hand, includes a spreadsheet notebook of the present invention as described in further detail herein below.

## INTERFACE

### A. Introduction

The following description will focus on the presently preferred embodiments of the present invention, which are embodied in spreadsheet applications operative in the Microsoft Win95 environment. The present invention, however, is not limited to any particular application or any particular environment. Instead, those skilled in the art will find that the system and methods of the present invention may be advantageously applied to a variety of system and application software, including database management systems, word processors, and the like. Moreover, the present invention may be embodied on a variety of different platforms, including Macintosh, UNIX, NextStep, and the like. Therefore, the description of the exemplary embodiments which follows is for purposes of illustration and not limitation.

Referring now to FIG. 1C, the system 100 includes a windowing interface or workspace 160. Window 160 is a rectangular, graphical user interface (GUI) for display on screen 106; additional windowing elements may be displayed in various sizes and formats (e.g., tiled or cascaded), as desired. At the top of window 160 is a menu bar 170 with a plurality of user-command choices, each of which may invoke additional submenus and software tools for use with application objects. Window 160 includes a client area 180 for displaying and manipulating screen objects, such as graphic object 181 and text object 182. In essence, the client area is a workspace or viewport for the user to interact with data objects which reside within the computer system 100.

Windowing interface 160 includes a screen cursor or pointer 185 for selecting and otherwise invoking screen objects of interest. In response to user movement signals from the

pointing device 105, the cursor 185 floats (i.e., freely moves) across the screen 106 to a desired screen location. During or after cursor movement, the user may generate user-event signals (e.g., mouse button "clicks" and "drags") for selecting and manipulating objects, as is known in the art. For example, Window 160 may be closed, re-sized, or scrolled by "clicking" (selecting) screen components 172, 174/5, and 177/8, respectively.

In a preferred embodiment, screen cursor 185 is controlled with a mouse device. Single-button, double-button, or triple-button mouse devices are available from a variety of vendors, including Apple Computer of Cupertino, Calif., Microsoft Corporation of Redmond, Wash., and Logitech Corporation of Fremont, Calif., respectively. More preferably, screen cursor control device 105 is a two-button mouse device, including both right and left "mouse buttons."

Programming techniques and operations for mouse devices are well documented in the programming and hardware literature; see e.g., *Microsoft Mouse Programmer's Reference*, Microsoft Press, 1989. The general construction and operation of a GUI event-driven system, such as Windows, is also known in the art: see, e.g., Petzold, C., *Programming Windows*, Second Edition, Microsoft Press, 1990. The disclosures of each are hereby incorporated by reference.

#### 5 B. Preferred interface

Shown in FIG. 2A, a spreadsheet notebook interface of the present invention will now be described. The spreadsheet notebook or workbook of the present invention includes a notebook workspace 200 for receiving, processing, and presenting information, including alphanumeric as well as graphic information. Notebook workspace 200 includes a menu bar 210, a toolbar 220, a current cell indicator 230, an input

line 231, a status line 240, and a notebook window 250. The menu bar 210 displays and invokes, in response to user inputs, a main level of user commands. Menu 210 also invokes additional pull down menus, as is known in windowing applications. Input line 231 accepts user commands and information for the entry and editing of cell contents, which may include data, formulas, macros, and the like. Indicator 230 displays an address for the current cursor (i.e., active cell) position, or the address or name of a selected named range (i.e. active selection). At the status line 240, system 100 displays information about the current state of the workbook; for example, a "READY" indicator means that the system is ready for the user to select another task to be performed.

The toolbar 220, shown in further detail in FIG. 2B, comprises a row or palette of tools which provide a quick way for the user to choose commonly-used menu commands or properties. In an exemplary embodiment, toolbar 220 includes file manipulation buttons 221, printing buttons 222, an undo button 223, cut, copy, and paste buttons 224, information pop-up window buttons tool 225, a named range selection button 226, a style copy button 227, a column re-sizing button 228, and a sum button 229. The functions of these buttons are suggested by their names. For instance, buttons 224 cut, copy and paste data and objects to and from Windows' clipboard. The same actions are also available as corresponding commands in the Edit menu (available from menu bar 210).

The notebook, which provides an interface for entering and displaying information of interest, includes a plurality of spreadsheet pages. Each page may include conventional windowing features and operations, such as moving, re-sizing, and deleting. In a preferred embodiment, the notebook includes 30 256 spreadsheet pages, all of which are saved as a single disk

file on the mass storage 107. Workspace 200 may display one or more notebooks, each sized and positioned (e.g., tiled, overlapping, and the like) according to user-specified constraints.

5    Each spreadsheet page of a notebook includes a 2-D spread. Page A from th notebook 200, for example, includes a grid in row and column format, such as row 3 and column F. At each row/column intersection, a box or cell (e.g., cell C4) is provided for entering, processing, and displaying information 10 in a conventional manner. Each cell is addressable, with a selector being provided for indicating a currently active one (i.e., the cell that is currently selected).

As shown in FIGS. 2C-D, individual notebook pages are identified by page identifiers 260, preferably located along 15 one edge of a notebook. In a preferred embodiment, each page identifier is in the form of a tab member (e.g., members 261a, 262a, 263a) situated along a top edge of the notebook. Each tab member may include representative indicia, such as textual or graphic labels, including user selected titles representing 20 the contents of a corresponding page. In FIG. 2C, the tab members 260 are set to their respective default names. For example, the first three tab members (members 261a, 262a, 263a) are respectively set to A, B, and C. Tab members are typically given descriptive names provided by the user, 25 however. As shown in FIG. 2D, for example, the first three tab members have now been set to "Contents" (tab member 261b), "Summary" (tab member 262b), and "Jan" (tab member 263b). In a similar manner, the remaining tabs are set to subsequent months of the year. In this manner, the user associates the 30 page identifiers with familiar tabs from an ordinary paper notebook. Thus, the user already knows how to select a page or spread of interest: simply select the tab corresponding to the

page (as one would do when selecting a page from a paper notebook).

In addition to aiding in the selection of an appropriate page of information, the user-customizable page identifiers serve  
5 aid in the entry of spreadsheet named range addresses. For example, when entering a formula referring to a named range of cells on another page, the user may simply use the descriptive page name in the named range address, thus making it easier for the user to understand the relationship of the cell(s) or  
10 information being referenced.

A general description of the features and operation of the spreadsheet notebook interface may be found in Quattro Pro for Windows (*Getting Started, User's Guide and Building Spreadsheet Applications*), available from Borland  
15 International.

#### MANAGEMENT OF USER-DEFINED OPTIONS

##### **A. Introduction**

As the power of spreadsheet environments has increased since several years, it is today possible to develop complex custom  
20 applications solely based on spreadsheets, as opposed to applications developed with general purpose programming languages like C++ or VisualBasic from Microsoft Corporation. This can be achieved thanks to spreadsheet imbedded tools such as macro languages, script languages, formulas and versions.

25 In typical spreadsheet based applications, it is common to find individual cells or ranges of multiple cells whose content depends on one or several conditions. Running "what-if" scenario can therefore be seen as applying different sets of conditions to such condition dependent cells. With  
30 conventional electronic spreadsheet tools, this can be achieved thanks to the concept of version. A version is always associated to a range of cells (whether it contains a single

cell or multiple cells) and can be seen as a set of mutually exclusive instances of this range of cells. When multiple independent conditions have to be taken into account for running the "what-if" scenario, the resulting number of versions to be defined varies exponentially with the number of conditions. Indeed with  $N$  independent assumptions, there are  $2^N$  different combinations of these  $N$  assumptions. With  $N$  only equal to 7,  $2^N$  is already equal to 128. Thus even with a small number of conditions, there is a quite large number of condition combinations, which can easily reach the limit of the spreadsheet. Furthermore when different cells dispersed within an electronic spreadsheet, depend on the same set of conditions, conventional electronic spreadsheet tools propose to use the concept of version groups. Version groups require from the spreadsheet user a careful definition of the dependencies between the versions of the different cell ranges.

The present invention offers a user-friendly solution to this problem by defining a method and a system for managing user-defined options.

In the next sections, the above-mentioned conditions will be referred to as options. An option is defined as a boolean variable, which can be set as "True" or "False" and which may impact the content of any given cell within an electronic spreadsheet, by referencing it just as a conventional named range. For instance the formula "\$baseprice \*(1-10%\*\$discount)" refers on one hand to a conventional named range "baseprice" and on the other hand to a named range "discount" which is also defined as an option according to the present invention. In this example, when the option "discount" is "false" (with option value "false" conventionally set to 0), the formula takes the same value as the one contained in the named range "baseprice". Alternatively, when the option "discount" is "true" (with option value "true" conventionally

set to 1), the formula results in a value equal to the value of the named range "baseprice", decreased by 10%.

### B. Option Manager

In contrast to just-described conventional tools, the present invention provides a more powerful, user-friendly and interactive approach for managing user-defined options in the form of an "Option Manager". The Option Manager automatically allows the electronic spreadsheet user :

- to define if a given condition deserves to be handled as a so-called Option, and afterwards
- to manage this option.

In a preferred embodiment, the present invention is used in three steps :

- 1. **The first step** occurs when the spreadsheet user decides, based on some criteria not detailed here, if one or several conditions deserve to take advantage of the present invention, that is to be managed as one or several options by the Option Manager.

The user first invokes a specific command called "**Option Manager**" thanks to conventional means available in spreadsheet environment, such as (but not limited to) dedicated push-buttons, keyboard entry short cuts, menu or sub-menu entries. This results in displaying on the Display device 106 an Option Manager Dialog Box 300, as shown by FIG 3.

Within this Option Manager Dialog Box 300, the user can visualise already defined options in the "List Box" 301 (such as the ones named "year end", "volume", "new customer" and "rebate" as shown in FIG 3), as well as unused options whose names follow some predefined template, such as "option\*" where the character "\*" is a wild card for representing numbers. In the example shown in FIG 3, the

bottom option within the List Box 301 is named "option5" and therefore corresponds in this preferred embodiment as an unused option. Any other similar or different naming convention may be used without departing from the spirit of this invention. To visualise any other options, whether already defined or spare, not displayed within the list box 301 of the Option Manager Dialog Box 300, the user can for instance use the pointing device 105 to click on the scroll bar 302, so that the list box 301 can move upwards or downwards along the full set of used and spare options. Then the user typically decides to use the first unused option ("option5" as shown in the list box 301 within the Option Manager Dialog Box 300) for becoming the first new used option. For this purpose the user uses the pointing device 105 to click on the push-button "Rename" 305 located on the right of the "option5" element of the list box 301. This result in displaying on the display device 106 a new dialog box 310. Within this dialog box 310, a user entry field 311 allows the user to change with the keyboard 104 the default option name "option5" into a new one. If at that point the user decides, for any reason not detailed here, not to define a new option, it can cancel this operation by clicking on the push-button "Cancel" 313. This will result in closing the dialog box 310 from the display device 106 and then giving back control to the Option Manager dialog box 300. Alternatively, if the user wants to continue with the new option definition, it confirms the operation by clicking on the push-button "OK" 313 within the dialog box 310. This will result in closing the dialog box 310 from the display device 106 and then giving back control to the Option Manager dialog box 300. which now shows in the bottom of the list box 301 the new name of the just specified option. If the user wants to defined other new options, it can follow the same steps as long as spare options are left unused. When done, the user uses the pointing device 105 to

click on the push-button "Done" 306. This will result in closing the Option Manager Dialog Box 300 on the display device 106.

- 2. The second step occurs when the spreadsheet user decides, based on his or her own criteria not detailed here, to take advantage of the present invention by manipulating already defined options thanks to the Option Manager. Such manipulation can either be to rename one or several already defined options, or to read and/or to change the status (between the "True" and "False" status) of one or a plurality of already defined options.

In both cases, the user first invokes a specific command called "Option Manager" thanks to conventional means available in the spreadsheet environment, such as (but not limited to) dedicated push-buttons, keyboard entry short cuts, menu or sub-menu entries. This result in displaying on the display device 106 an Option Manager Dialog Box 300, as shown by FIG 3. Within this Option Manager Dialog Box 300, the user can visualise already defined options in the "List Box" 301 (such as the ones named "year end", "volume", "new customer" and "rebate" as shown in FIG 3). To visualise any other defined options possibly not displayed within the list box 301 of the Option Manager Dialog Box 300, the user can for instance use the pointing device 105 to click on the scroll bar 302, so that the list box 301 can move upwards or downwards along the full set of used and spare options. If the user choice is to rename one or several already defined options, then he/she has to follow, for each relevant options, a sequence of steps similar to the ones used to initially define a new option. In short it consists in first using the scroll bar 302 to display within the list box 301 the option to rename, then to click on the push-button "Rename" standing on the right of the selected option (as

the push-button 305 if the selected option appears at the bottom of the list box 301), then to replace by using the keyboard 104 within the displayed dialog box 310 the current option name displayed in the window 311, and then to click on the push-button "OK" 312. If the user choice is to read and/or change the status of one or several defined options, he/she begins as above to display within the list box 301 (possibly by using the scroll bar 302) the first option whose status must be read and/or updated. Once done, the status of this option is shown in the label box sitting immediately on the right of the list box 301. For instance if the currently managed option is the bottom one within the list box 301, then this status information is shown in the label box 303; it can take the values "TRUE" or "FALSE". If the user decides, for any reason not detailed here, to change the current status from "TRUE" to "FALSE" or conversely from "FALSE" to "TRUE", then the user must click with the pointing device 105 on the push-button "Change" 304. The effect of this operation is reflected within the Option Manager Dialog Box 300 by swapping the "TRUE" and "FALSE" values shown in the label box 304. All these steps must be repeated for every option for which the user wishes to read and / or update the status. When done, the user uses the pointing device 105 to click on the push-button "Done" 306. This will result in closing the Option Manager Dialog Box 300 on the display device 106.

- 3. The third step occurs when the spreadsheet user decides, based on his or her own criteria not detailed here, whether the content of a given cell must depend or not on a given specified option. If it is the case, then the option can be referenced within the target cell content as a classical named range, as conventionally done within electronic spreadsheets with the classical rule that the "FALSE" value corresponds to the value 0 and that the "TRUE" value

corresponds to the value 1. Let illustrate this by one example. It is assumed that the user relies on his/her electronic spreadsheet to compute the price of an item, and that the pricing structure allows both to apply a 10% discount if the item is sold during the year end promotion period, and to apply a 100\$ rebate for fidelity club members. Let further assume that the item base price equal to 1500\$ is contained within a cell which has received the name "baseprice", that the spreadsheet user has defined an option named "year end" to reflect if the year end promotion can be applied or not, and that the spreadsheet user has defined an option named "rebate" to reflect if the fidelity club rebate can be applied or not. Then the spreadsheet user can get the item customer price by filling the relevant cell of his/her spreadsheet with a formula taking the following form: "\$baseprice\*(1-10%\*\$year end)-\$rebate\*1500". When the electronic spreadsheet user takes advantage of the present invention by invoking the Option\_Manager command for changing the status of the two options "year end" and "rebate" as described above in the second step, then the cell containing the above formula will show the values 1500\$, 1350\$, 1400\$ and 1250\$ when the option pair ("year end", "rebate") respectively takes the values (FALSE, FALSE), (TRUE, FALSE), (FALSE, TRUE) and (TRUE, TRUE).

### 25 C. Option Table

The decision to define a new option, or to rename an existing option, or to change the status of an existing belongs to the user of the spreadsheet application. A single repository, called "Option Table", is used to record this information. This Option Table is preferably saved on a non volatile memory (typically but not necessary as part of the spreadsheet disk file on the mass storage 107).

Referring now to FIG. 4, the Option Table 400 corresponds to a logical simple structure made of several records 401, each of

them associated with an option. Each record includes three fields:

- An "**Option Index**" field 402 is used for sorting the option table. When options are displayed within the list box 301 of the Option Manager Dialog Box 300, they are presented according to the index sequence, starting at the last recorded position.
- An "**Option Name**" field 403 is used to record the name of the option of record 401. As already discussed, the default value of an unused option can follow a template such as "option\*". For options defined by the spreadsheet user, the option name field 403 records the user specified name, as it was entered by the spreadsheet user thanks to the window 311 of the dialog box 310.
- An "**Option Status**" field 404 is used to record the current status (either "TRUE" or "FALSE") of the option of record 401. This information is reflected in the label box 303 of the Option Manager Dialog Box 300.

### C. Option Manager method

The method of managing user-defined options is summarised in FIG 6:

- At step 601, the method is waiting for a user request to display on the display device 106 an Option Manager Dialog Box (OMDG) 300.
- At step 602, a user request for displaying the OMDG 300 on the display device 106 is detected.
- At step 603, the OMDG 300 is displayed on the display device 106. The option attributes (names and status) are shown in relevant windows as recorded in the option table 400.
- At step 604, the method is waiting for a user action on the OMDG 300.

- At step 605, a user action on the OMDG 300 for either manipulating the options (creating a new option, renaming an existing option, changing the status of an existing option), or for closing the OMDG 300 is detected. In the 5 former case, control is given to step 606, in the later case control is given to step 607.
- At step 606, the OMDG is closed on the display device 106 and control is given back to the initial step 601 for treating any new future request.
- 10 • At step 607, the option table 400 is updated to reflect the change on the option, as detected during the step 605.
- At step 608, every cell of the spreadsheet whose content depends on the user-defined options is updated according 15 to the former option table change. Then control is given back to the step 603 to display in the OMDG the result of the user action which was detecting at step 605.

The method of handling user-defined options to take advantage of the present invention is detailed in flowchart 500 of FIG 20 5. This method can be seen as the processing of the Option\_Manager command used for defining a new option, or renaming an existing option, or changing the status of an existing option. The method comprises the following steps :

- At step 501, the method is in its default state, waiting for 25 an event to initiate the process.
- At step 502, an event is detected, as a result of a user action. This action can be for instance a specific combination of key on the keyboard 104, or the click of the pointing device 105 on a specific button, or any other similar means not further specified here.
- 30 • At step 503, a local variable named "StartIndex" is initialised with the value of another local variable named "LastStartIndex". This later variable is used to record the

option index 402, within the option table 400, of the option which was displayed at the top of the list box 301 within the Option Manager Dialog Box 300. The two variables StartIndex and LastStartIndex are recorded with classical means, such as but not limited to the spreadsheet disk file on the mass storage 107.

- At step 504, the Option Manager Dialog Box 400 is displayed on the display device 106. The option name appearing on the top of the list box 301 corresponds to the option name field 403 of the record 401 in the option table 400 whose option index field 402 is equal to the variable StartIndex. Underneath option names within this list box 301 correspond to the option name fields 403 of the following records 401 of the option table 400. The values "TRUE" or "FALSE" displayed in the label boxes like 303 correspond to the option status fields 404 found in the option table 400 for the same records 401.
- At step 505, the method is waiting for any user action on the Option Manager Dialog Box 400. Such user action is typically resulting from a click with the pointing device 105, but take other similar forms such as, but not limited to a specific combination of key on the keyboard 104, or any other similar means not further specified here
- At step 506, a user action on the Option Manager Dialog Box 400 is detected. If the user action is a click on the push-button "Done" 306, then control is given to step 507; if the user action is a click on a push-button "Change" like 304, then control is given to step 509; if the user action is a click on a push-button "Rename" like 305, then control is given to step 510; if the user action is a click on the up-arrow of the scrolling bar 302, then control is given to step 516; and if the user action is a click on down-arrow of the scrolling bar 302, then control is given to step 517.

- At step 507, the value of the variable LastStartIndex is set equal to the current value of the variable StartIndex.
- At step 508, the Option Manager Dialog Box 400 is closed, so that it disappears from the display device 106, and control is given back to the initial step 501 for treating any future Option\_Manager command.
- At step 509, the Option table 400 is updated to modify the option status field 404 for the record 401 whose option name field 403 matches the name found in the list box 301 with the same horizontal relative position as the clicked "Change" push-button of type 304. This option status field 404 modification corresponds to a swap between the values "TRUE" and "FALSE". Then control is given to the step 518.
- At step 510, the user is prompted to specify the new name of the selected option. This can be done with conventional means as the Dialog box 310 which is part of the preferred embodiment, but any functionally equivalent means can be used instead, without departing from the spirit of the invention.
- At step 511, the new option name specified by the spreadsheet user is checked against a set of rules not detailed here to determine if it is or not a valid option name. Such rules are typically implementation dependent and thus do not belong to the scope of the present invention. If the result of this checking is that the new option name is found as valid, then control is given to step 512, otherwise control is given to step 513.
- At step 512, the Option table 400 is updated to modify the option name field 403 for the record 401 whose former option name field 403 matched the previous name which has been updated at step 511. Then control is given to step 518.
- At step 513, an error message notification is issued for warning the user that the new name specified at step 510 has not passed the name validity checking of step 511. This can typically be done by displaying on the display device 106 an

error message in a pop-up window, but any other similar means could be used instead, without departing from the spirit of the present invention.

- At step 514, the method is waiting for a user acknowledgement, meaning that the error message notification of step 513 has been received by the spreadsheet user.
- At step 515, the user acknowledgement is detected. This can typically correspond to the click, thanks to the pointing device 105, on a "OK" push-button within the pop-up window typically displayed during the step 513, but other similar means can be used instead, without departing from the spirit of the present invention. Then control is given to step 518.
- At step 516, the value of the variable StartIndex is decremented as long as the resulting new value remains positive. Then control is given to step 518.
- At step 517, the value of the variable StartIndex is incremented as long as the resulting new value remains less or equal than a fixed value OptionTableSize corresponding to the highest option index 402 of a record 401 within the option table 400 that can be displayed within the list box 301 of the Option Manager Dialog Box 300. Then control is given to step 518.
- When the step 518 is reached, the fields 301 (list box containing the option names) and 303 (labels reflecting the option status) within the Option Manager Dialog Box 300 are refreshed on the display device 106 to reflect the user actions taken at step 506. Then control is given to step 505.

#### ALTERNATE EMBODIMENTS

While the invention has been particularly shown and described with reference to a preferred embodiment, it will be understood that various changes in form and detail may be made

therein without departing from the spirit, and scope of the invention.

The Option\_Manager method and system according to the present invention may be used advantageously in environments where elements of information are organised as multidimensional tables having more than three dimensions.

**Claims**

What is claimed is:

1. A method of processing user defined boolean variables in a multi dimensional spreadsheet (200) comprising a plurality of cells identified by a cell address along each dimension, said method comprising the steps of:

- defining one or a plurality of boolean variables in a table (400);
- referencing said one or plurality of boolean variables in one or a plurality of cells;
- activating one or plurality of boolean variables in said table (400);
- determining the content of said cell or plurality of cells depending on whether said one or plurality of boolean variables are activated or not in said table.

2. The method according to the preceding claims wherein said step of defining one or a plurality of boolean variables in a table, comprises the further steps of:

for each defined boolean variable:

- assigning a name (311) and storing in the table (400) said name (403);
- selecting a status value (303) depending on whether the boolean variable is activated or not and storing in the table said status value (404) .

3. The method according to any one of the preceding claims wherein said step of activating one or plurality of boolean variables in said table, comprises the further step of:

- updating in the table the status value (304, 404) of the one or plurality of activated boolean variables.

4. The method according to any one of the preceding claims wherein the step of determining the content of said cell or plurality of cells depending on whether said one or plurality of boolean variables are activated or not, comprises the further step of:

- determining, referring to the table (400), whether the one or the plurality of boolean variables referenced in the cell or plurality of cells are activated or not;
- computing the value of said cell or plurality of cells according to the value of said one or plurality of activated boolean variables.

5. The method according to any one of the preceding claims comprising the further step of:

- changing in the table (400) the name (311) of one or a plurality of boolean variables.

6. The method according to any one of the preceding claims wherein said step of selecting a status value (303) depending on whether the boolean variable is activated or not comprises the further steps of:

- setting the status value of the boolean variable to "true" if said boolean variable is activated, and
- setting the status value of the boolean variables to "false" if said boolean variable is not activated.

7. The method according to any one of the preceding claims comprising the further step of:

- setting the value of the boolean variable to one when the status value is "true", or
- setting the value of the boolean variable to zero when the status value is "false".

5 8. The method according to any one of the preceding claims wherein said steps of assigning a name, changing the name, selecting a status value, updating the status value are executed by means of an interactive user interface.

10 9. The method according to any one of the preceding claims wherein said interactive user interface comprises a dialog box (300) displayed on a screen (106) of a computer system (100).

10. A system (100) comprising means adapted for carrying out the method according to any one of the preceding claims.

15 11. A computer program comprising computer readable instructions adapted for carrying out the method according to claims 1 to 9.

METHOD AND SYSTEM IN AN ELECTRONIC SPREADSHEET FOR  
MANAGING AND HANDLING USER-DEFINED OPTIONS

**Abstract**

The present invention relates to the field of information processing by digital computers, and more particularly to a method and system of processing user defined boolean variables in a multi dimensional spreadsheet comprising a plurality of cells identified by a cell address along each dimension, said method comprising the steps of:

- 5      • defining one or a plurality of boolean variables in a table;
- 10     • referencing the one or plurality of boolean variables in one or a plurality of cells;
- 15     • activating one or plurality of boolean variables in the table;
- determining the content of the cell or plurality of cells depending on whether the one or plurality of boolean variables are activated or not in the table.

Figure 3

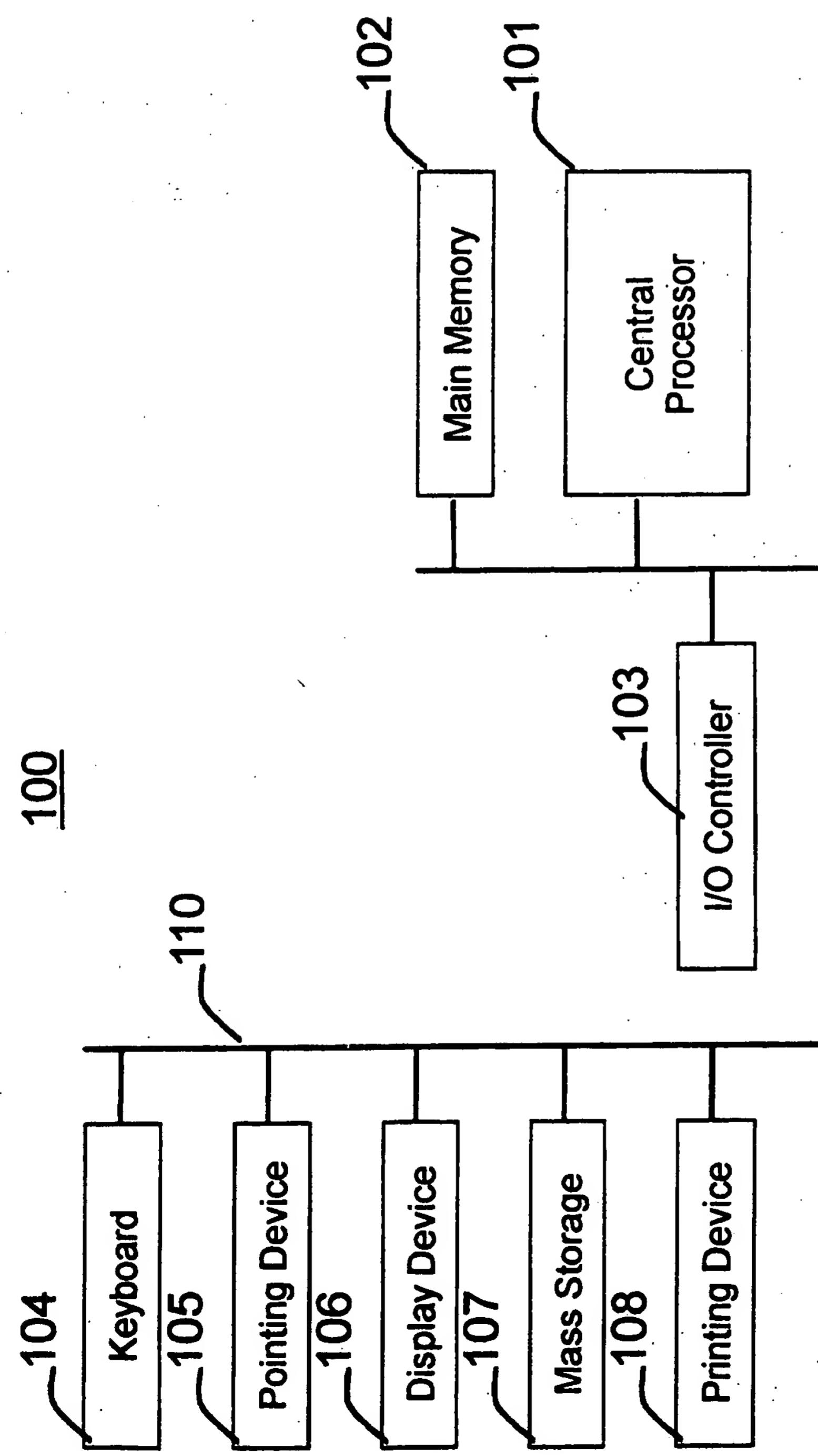


FIG 1A

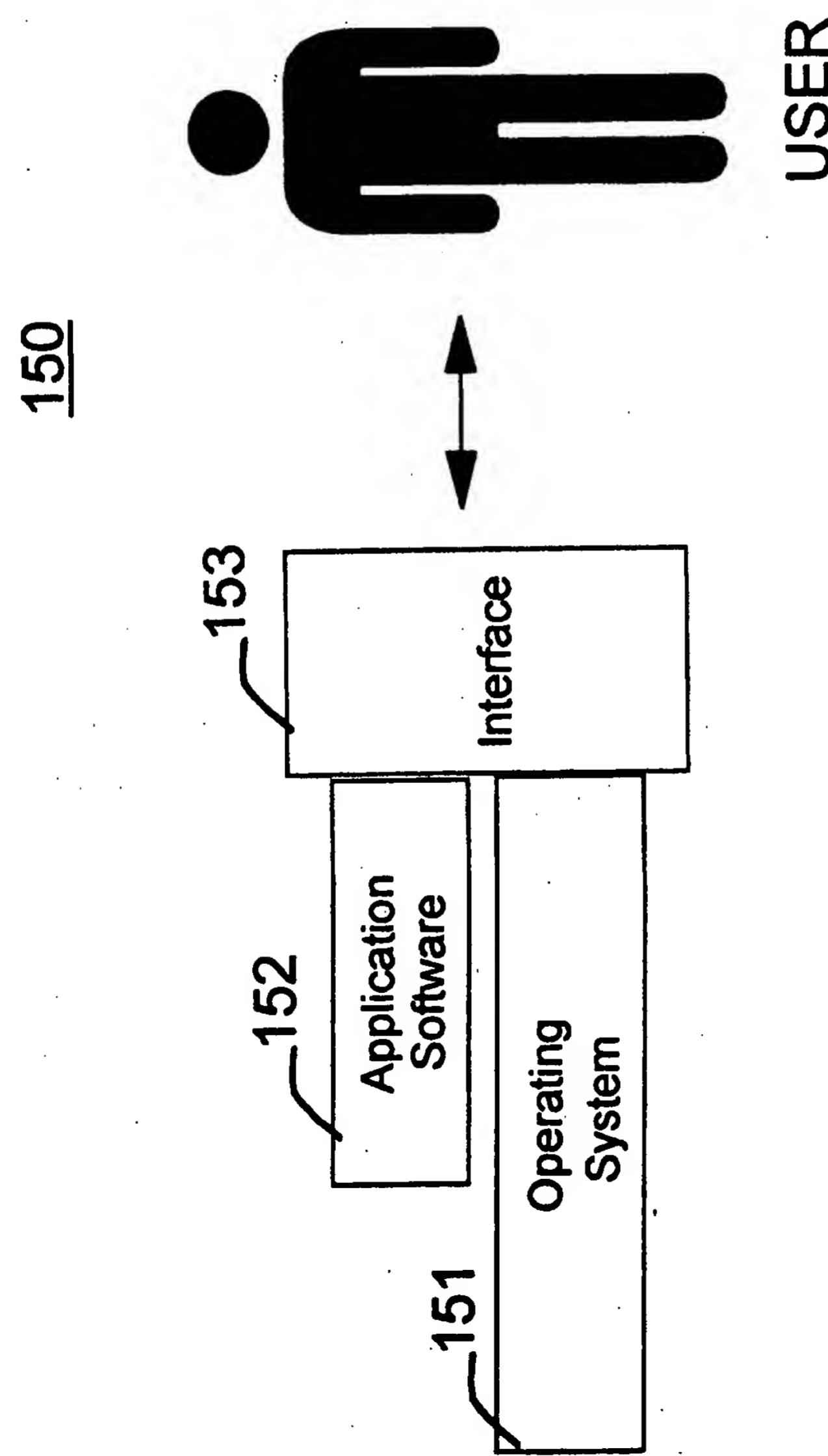
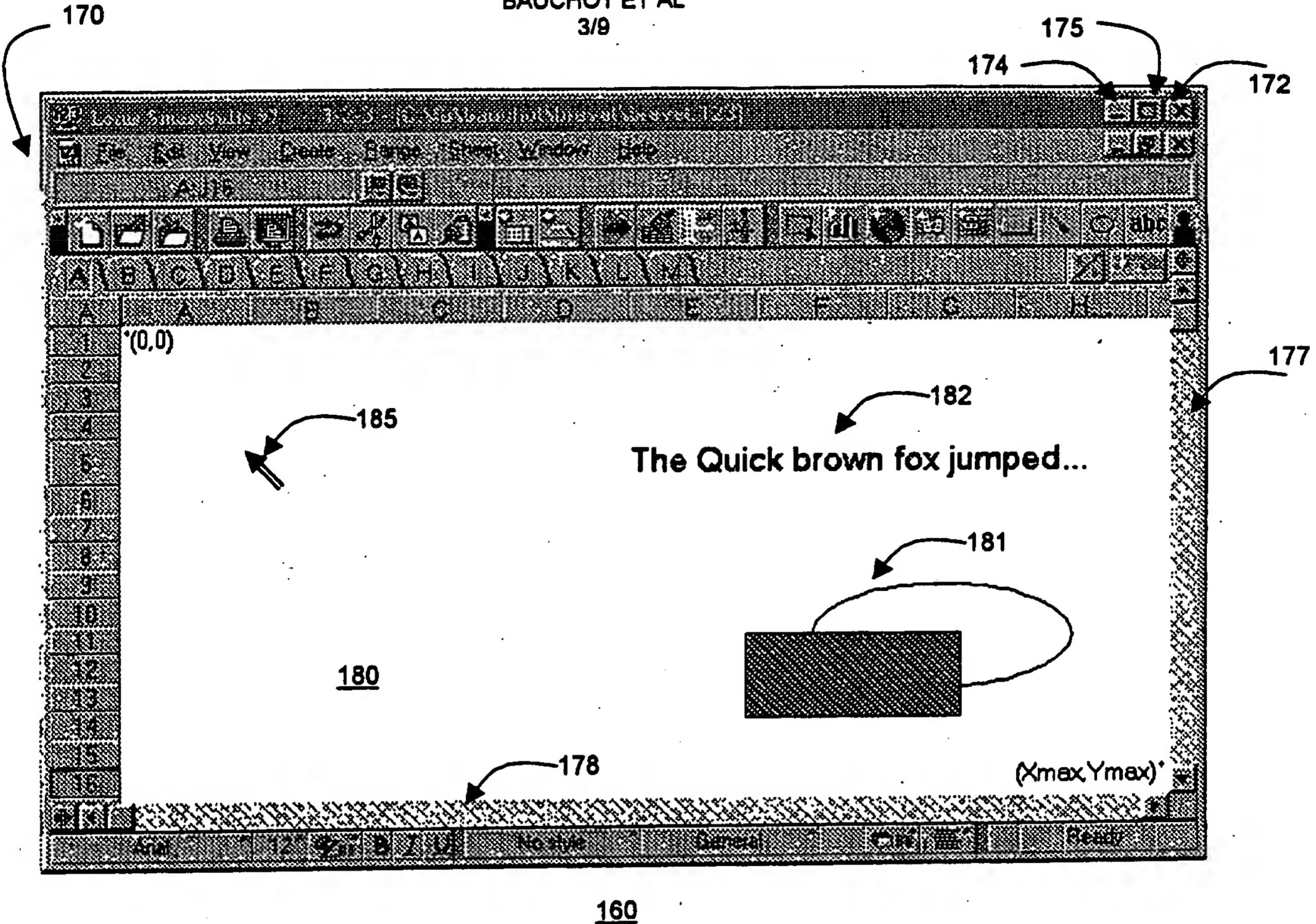


FIG 1B



**FIG.1C**

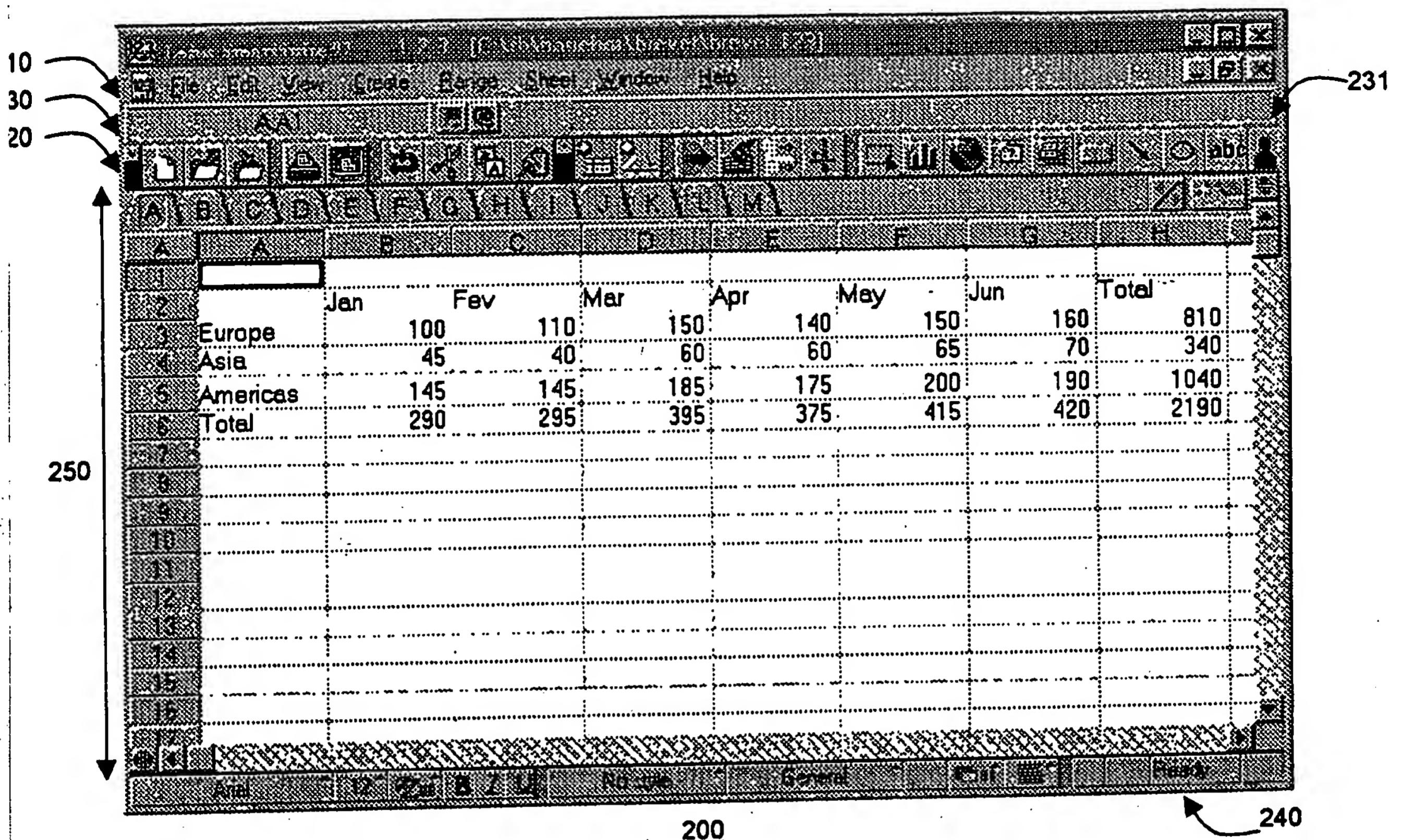


FIG. 2A

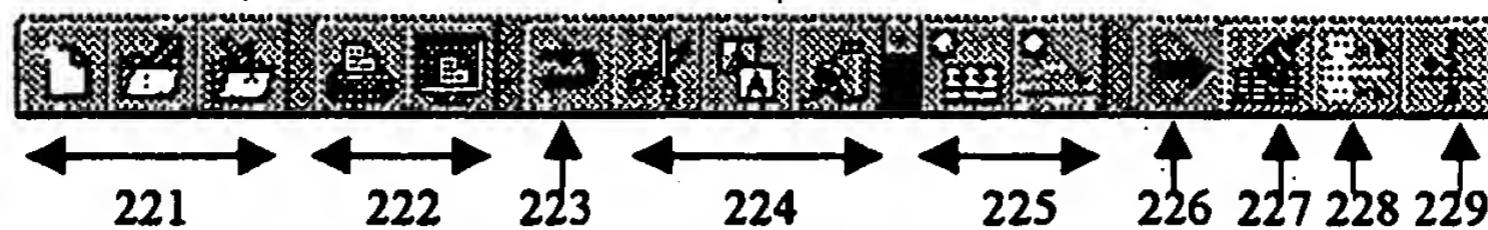


FIG. 2B

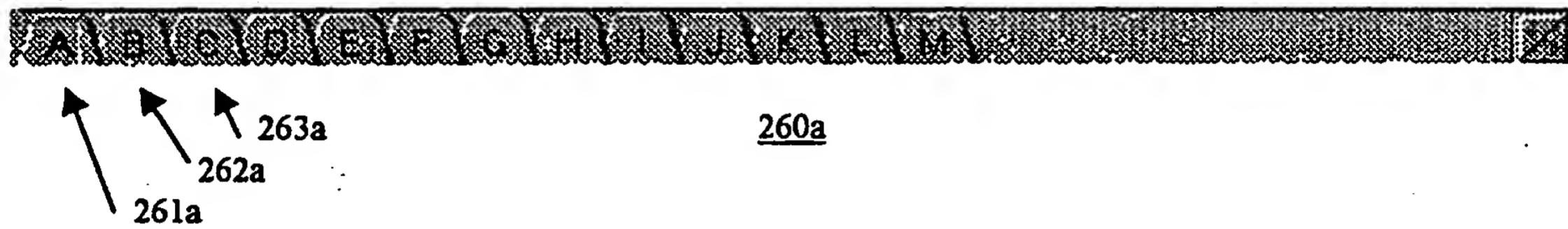


FIG. 2C

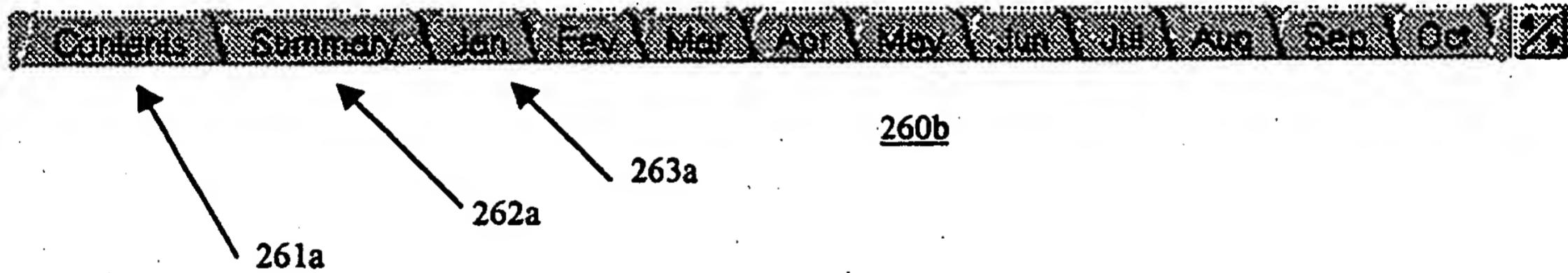


FIG. 2D

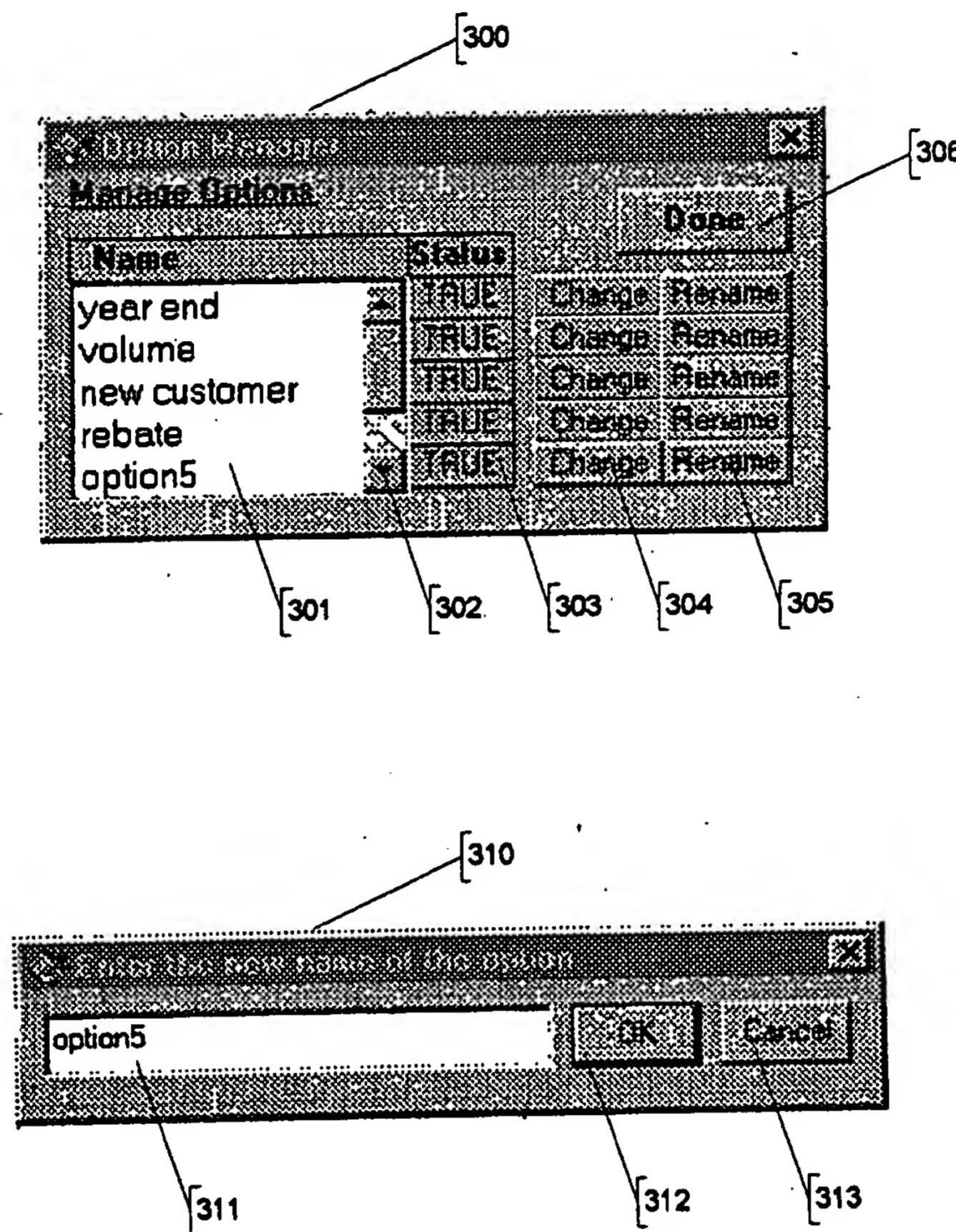


Fig. 3

FR 9-2000-0032

Bauchot et al.

7/9

Option Index	Option Name	Option Status
[402]	[403]	[404]

**Fig. 4**

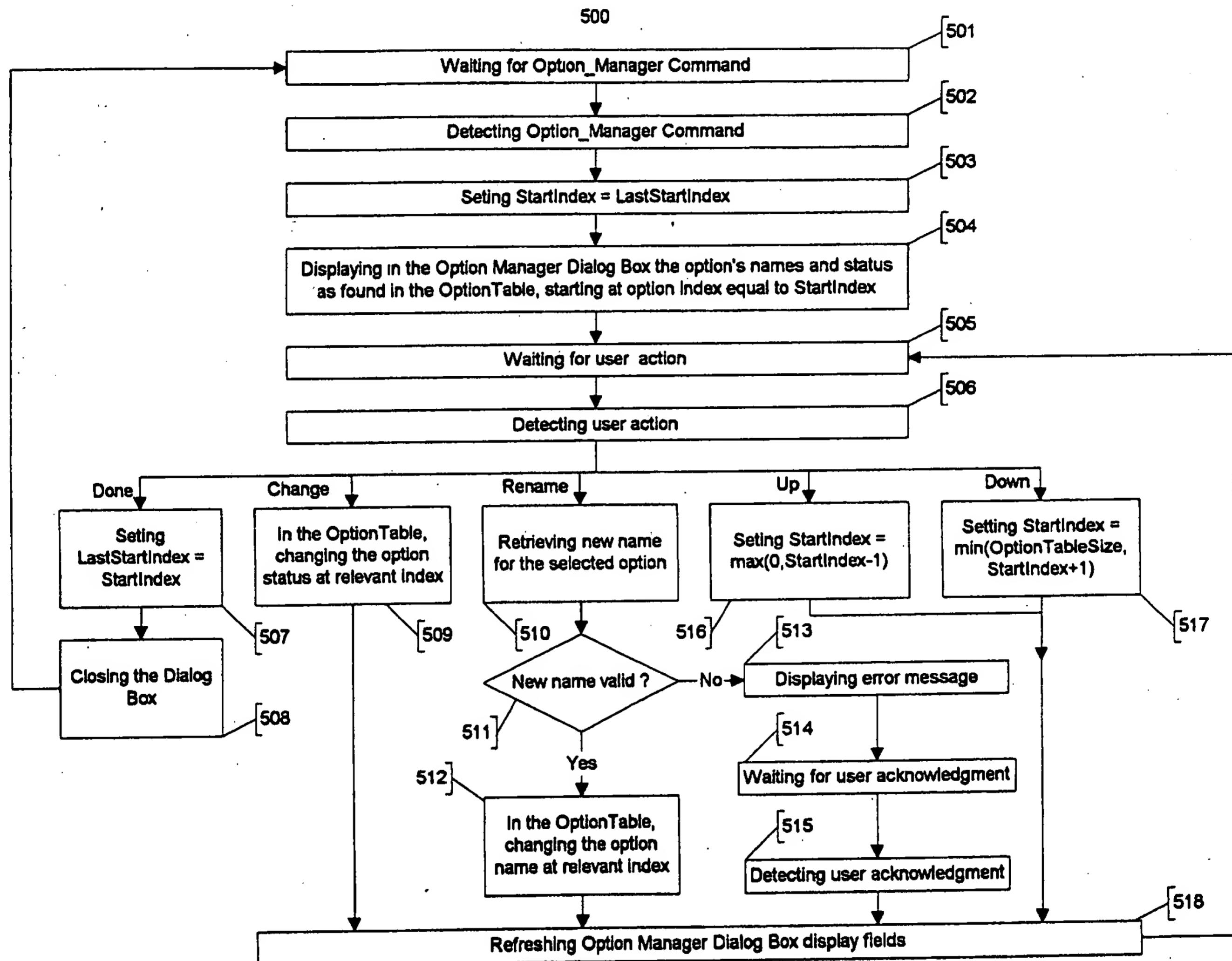


Fig. 5

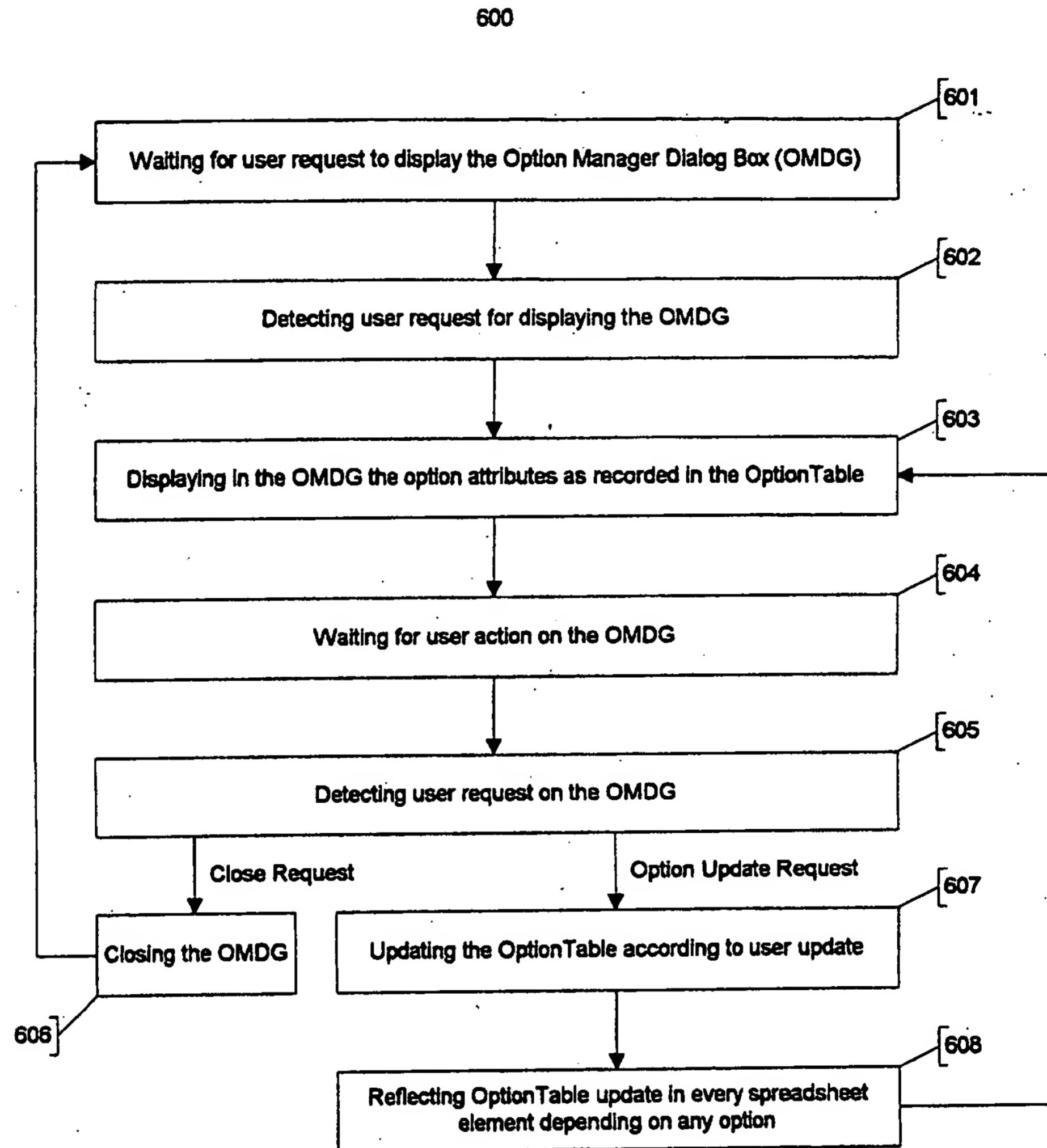


Fig. 6

INTERFACE**A. Introduction**

The following description will focus on the presently preferred embodiments of the present invention, which are embodied in spreadsheet applications operative in the Microsoft Win95 environment. The present invention, however, is not limited to any particular application or any particular environment. Instead, those skilled in the art will find that the system and methods of the present invention may be advantageously applied to a variety of system and application software, including database management systems, word processors, and the like. Moreover, the present invention may be embodied on a variety of different platforms, including Macintosh, UNIX, NextStep, and the like. Therefore, the description of the exemplary embodiments which follows is for purposes of illustration and not limitation.

Referring now to FIG. 1C, the system 100 includes a windowing interface or workspace 160. Window 160 is a rectangular, graphical user interface (GUI) for display on screen 106; additional windowing elements may be displayed in various sizes and formats (e.g., tiled or cascaded), as desired. At the top of window 160 is a menu bar 170 with a plurality of user-command choices, each of which may invoke additional submenus and software tools for use with application objects. Window 160 includes a client area 180 for displaying and manipulating screen objects, such as graphic object 181 and text object 182. In essence, the client area is a workspace or viewport for the user to interact with data objects which reside within the computer system 100.

Windowing interface 160 includes a screen cursor or pointer 185 for selecting and otherwise invoking screen objects of interest. In response to user movement signals from the

104, a pointing device 105 (e.g., mouse, track ball, pen device, or the like), a display device 106, and a mass storage 107 (e.g., hard disk). Additional input/output devices, such as a printing device 108, may be included in the system 100 as desired. As illustrated, the various components of the system 100 communicate through a system bus 110 or similar architecture. In a preferred embodiment, the computer system 100 includes an IBM-compatible personal computer, which is available from several vendors (including International Business Machine - IBM Corporation of Armonk, N.Y.).

Illustrated in FIG. 1B, a computer software system 150 is provided for directing the operation of the computer system 100. Software system 150, which is stored in system memory 102 and on disk memory 107, includes a kernel or operating system 151 and a shell or interface 153. One or more application programs, such as application software 152, may be "loaded" (i.e., transferred from storage 107 into memory 102) for execution by the system 100. The system 100 receives user commands and data through user interface 153; these inputs may then be acted upon by the system 100 in accordance with instructions from operating module 151 and/or application module 152. The interface 153, which is preferably a graphical user interface (GUI), also serves to display results, whereupon the user may supply additional inputs or terminate the session. In a preferred embodiment, operating system 151 and interface 153 are Microsoft Win95, available from Microsoft Corporation of Redmond, Wash. Application module 152, on the other hand, includes a spreadsheet notebook of the present invention as described in further detail herein below.